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Note: Click on a section name above to go directly to that page
How to Login
Quick Tip:

- Navigate to [www.rcm1.com](http://www.rcm1.com)
- Click on Login
- Enter your Email Address and Password.
  - If you do not have a password, please click on [Forgot Password](#). After entering your email address, you will be sent a link to reset your password. All passwords must be 8 characters with at least 1 upper case and at least 1 number.
  - If you do not have an account, contact your RCM Account Manager.

RCM will timeout after 45 minutes of inactivity and you will be prompted to log back in.
My Projects
## My Projects

If you already have listings in RCM, click My Projects to view all Projects you administer.

### Key

1. Click to view the Projects you manage.
2. Click on the Project name or image to administer your Project.
3. Use shortcut icons to go directly to specific administrative areas.

### Table: My Projects

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Description</th>
<th>City</th>
<th>Launch Date</th>
<th>Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Willis Tower</td>
<td>Office - High Rise</td>
<td>Chicago, IL</td>
<td>12/09/2014</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leasing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Available</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promenade Rio Vista</td>
<td>Multifamily - Condo Conversion</td>
<td>San Diego, CA</td>
<td>10/24/2013</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Investment Sale</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Under Contract/Escrow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dodger Stadium</td>
<td>Specialty - Country Club / Golf Course</td>
<td>Los Angeles, CA</td>
<td>08/14/2007</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Investment Sale</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Available</td>
<td></td>
<td></td>
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</tbody>
</table>

### Quick Tip:

You can export the details of all your Projects, including marketing activity information.
Overview Tab
Overview/Details

The Overview/Details tab is where you input your Project information such as the name, asset type, location, description, and value. Fields that are checked to Display will be shown to the public on the RCM Marketplace.

Key

1. Click the plus sign to map multiple addresses.
2. Primary Fields are based on Asset Type.
3. Projects will automatically move from Pre-Marketing to Available after initial broadcast.
4. Upload Primary Image to be displayed on the RCM Marketplace.
5. Change map pin location and zoom option that is displayed on your Executive Summary and/or the RCM Marketplace.

Quick Tip: If you change your status to Taken Off Market or Sold, all access links will be deactivated and your listing will automatically be removed from the RCM Marketplace.
Overview/Details (cont’d)

Quick Tip: To edit the map view/pin of additional addresses, click on the plus sign, choose the address and select Edit to adjust the map.

Key

1. The listing pin displayed on the Project, RCM Marketplace and your Executive Summary, is automatically set based on the address entered.

2. Click the map to verify or edit the pin location, set the zoom level, and choose either Bing or Google maps.

NOTE: Any change you make to the project address will affect the mapping. Incomplete addresses (missing zip code, misspelled street name) will not map correctly and will need to be set manually.
Overview/Contacts

Everyone listed on the Overview/Contacts tab has administrative access to your Project. Here you will add or remove administrative contacts and designate individuals to receive notifications such as Executed Agreements, Questions, Offers, Project Expirations and Reports.

Key

1. Click Contacts to view contacts who can administer your Project.
2. Click the Add button to add administrative contacts.
3. Click New to create new contacts.

**NOTE:** You can limit contacts to specific tabs in your Project. For example, you can provide your Seller access only to the Virtual Deal Room to upload documents. They will be unable to access the other tabs. Please contact your account manager to set these permissions.

Quick Tip: You can give administrative access to the Seller so they can log in and view reports or upload files to the Virtual Deal Room.
Overview/Contacts (cont’d)

Quick Tip: You can mouse over each checkbox for a definition of each notification.

Key

4. Click to set and edit Notifications.

5. Re-order names by dragging them to the desired location (i.e. if you would like Mark Day to appear as the first contact on the listing, move his name to the top).

6. Select the Notifications each contact should receive. Note: At least one contact is required to receive Renewals and Questions.

Display: Display this contact’s name and information on investor-facing pages such as the Executive Summary, RCM Marketplace, Offer and Auction pages.

CA: Receive email notifications each time a User executes a Confidently Agreement online.

Questions: Receive questions submitted via the platform and when a user declines the offering.

Offers: Receive email notification of offers submitted online.

Renewals: Receive notices when your Project is approaching expiration.

Reports: Receive Project Activity Reports 3 and 10 days after the Initial Broadcast.
Overview/Listing

Set up how the Project will display to the public on the RCM Marketplace. Add a Summary, choose the number of contacts displayed, and add/remove the Project from the RCM Marketplace.

**If checked, your Listing will automatically appear on the RCM Marketplace after broadcasted.**

Key

1. Provide a brief description of the Project to display on the RCM Marketplace.
2. Select what you’d like the User to see when clicking on your listing (Executive Summary, Brochure or Confidentiality Agreement).
3. Select the number of contacts you wish to display. This order is based on the order the brokers are listed on the Overview/Contacts tab.
4. Add your Project to the RCM Marketplace (no additional fee).

Quick Tip: You can choose to have up to 3 contacts display on the RCM Marketplace.
Executive Summary Tab
Executive Summary (Setup)

Depending on the package purchased, you have the option of selecting the below options: Modern Landing Page, Classic Landing Page, Teaser or Brochure Only.
Executive Summary (Selecting Your Modern Landing Page)

Once you have created a project, you'll be able to customize a Landing Page that highlights your listing using one of the templates provided. Preview and select the Landing Page template you would like to use under the Executive Summary tab.

Key
1. To preview a template, click View Sample (note the preview is placeholder content).
2. To select your template, click Select on the desired theme.
Customizing your Landing Page

Once you have selected the desired template, customizing the site is quick and simple.

Key

1. Select the Options button, located on the top right, to start customizing.

2. Select the Upload icon to include a brochure, and upload your PDF here.

3. Enter your base color of the site as a hex value, or use the drop down for a color selection tool.

4. Enter links to your social media pages, which will display in the footer of the site.
Customizing your Landing Page (cont’d)

Continue your customizations by uploading images and text.

Key

1. Add text and update section header names by clicking in each section within the editor.

2. To upload section images, hover over any of the image placeholders within the editor and an add image icon will appear - select Add/Insert Image.

   Recommended Image Sizes:
   - Logo: 200px X 60px
   - Background - Main: 2048px X 1365px
   - Background - Statistics: 2048px X 2048px
   - Footer: 2048px X 1365px

The map image, property address, statistics (asking price, units, size, year built), and contacts will automatically populate from your project overview page.

3. Move or remove sections by hovering over a section. Arrows and a trash can will appear in the upper right corner of each section.
Customizing your Landing Page (cont’d)

Continue your customizations by uploading images and text.

Key

1. Add a new section and select the layout at the top of the editor by selecting the Add Section button.

**NOTE:** The Statistics template will display Asking Price, Units, Size and Year Built only if it has been checked to display on the Overview/Details tab.

2. Add photos to the Photo Gallery section by inserting them within the Photo Gallery tab (not the Landing Page tab).

3. Preview the landing page at any time using the Preview button located at the top right (next to options).

4. Don’t forget to select Save at the bottom of the page when you make changes to your landing page.
Executive Summary (Classic Landing Page - Administrative View)

You are provided a Landing Page template where each tab has a different layout. Update the template by re-ordering, removing or adding tabs, changing tab names, and inputting the images and content.

Key

1. Click to upload a PDF Brochure (optional).
2. Right-click on a tab to rename, add, remove or hide. You can also drag and drop tabs to re-order.
3. Click the link icon to add an external URL, such as a video hosted elsewhere.
4. Click the image icon to add images or right-click images to replace.
5. Click on the chart icon to create charts.

Quick Tip: External URLs are not tracked in reporting. If you need to know who is clicking those links, place the files in the Virtual Deal Room.
Executive Summary (Classic Landing Page - Administrative View cont’d)

Quick Tip: When copying and pasting text from another source such as Microsoft Word, paste into Note-Pad first to remove any hidden formatting.

Key

6. Copy the Landing Page from one of your previous Projects by clicking the Copy button.

7. Add content into the template by pasting from an existing document or typing directly into the editor.
Executive Summary (Photo Gallery)

The Landing Page and Teaser can include four different image types:

- **Gallery Images**: Upload unlimited images with captions to create a photo gallery. Once you have uploaded all of the images, click on Gallery Options on the top left, and reorder the files as needed. The first image is the Primary Image.
- **Logo**: Click the Add button then Logo to upload a logo(s). Dimensions: 180 px by 135 px.
- **Banner**: Appears at the top of the Executive Summary, Landing Page, Teaser and Offers Page. Click the Add button, then Banner, to upload a banner. Dimensions: 960 px by 135 px.

Quick Tip: To replace a banner, you will first need to remove the existing file, click on the images drop down and add a new one. The Banner dimensions should be 960 x 135 pixels.
**Executive Summary** (Photo Gallery cont’d)

1. Upload images, logos or a banner.
2. Use the Gallery Options to reorder images, update your primary image and change the button name.
3. Drag image file names to reorder. The first/top image will be the primary image displayed on the RCM Marketplace.
4. A Photo Gallery is also available when Brochure Only or Teaser is selected on Executive Summary setup. Click Gallery Options and select Enable Photo Gallery.

Quick Tip: You can double-click on an image to add a caption to that photo.
Executive Summary (Classic Landing Page - Investor View)

SRS - THE STONE CREEK VILLAS
8888 W Thunderbird Rd., Peoria, AZ 85381, United States

Overview:
Minimal capital investments will be required in the future due to the condition and naivety of the project. Most of the building's square footage has been recently tenanted space. The tenant mix has excellent diversity, suitable tenants with time on leases mean low lease up and rollover costs in the near future.

Mresa Phoenix's strategic Southeast location, young, productive, educated labor base, and pro-business governance has attracted a diverse range of industries including aerospace, high-tech, medical, biocience, advanced business and sustainable technology companies.

Strong Market Dynamics
As commuting becomes more and more of a consideration to employers, centrally located projects like The Stone Creek Villas will increase in desirability, outperforming competing buildings with similar economics located on the perimeter of the metro area.

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Quick Tip: The landing page is mobile friendly and responsive, meaning the content, buttons and contact information will display differently depending on the device.

Key

1. Click through the tabs, view photo gallery and fly around the property with an interactive map.
2. Investors can click to view the Brochure if added, execute the Agreement, or access the Offers Page. Button names are customizable.
3. Names, contact information and display order are pre-populated from the Overview/Contacts tab. Investors can click on the name to email the Broker.
4. Translate the Executive Summary into multiple languages.
Confidentiality Agreement Tab
Confidentiality Agreement (Principals)

- You have the option to use a separate Confidentiality Agreement (CA) for principals and brokers on each Project. If you choose not to use a Confidentiality Agreement, Agreement reporting will not be available.

- Using the Online Execution setting is recommended. Investors simply verify their contact information and agree to the terms of the uploaded document - no need to print, sign, and fax back to you. All investor actions are recorded, and a printable version of the agreement is available to you via Reports.

- Choose whether to grant immediate access to the Virtual Deal Room upon execution of the CA or manually approve investors at a later time. You also have the option to grant immediate access unless they have entered notes to the Agreement.

Quick Tip: The platform is smart and will display the correct Principal/Broker agreement based on the User’s industry role.
Confidentiality Agreement (Brokers)

The system will display the appropriate Confidentiality Agreement based on the User’s Industry Role (ex: Principal or Broker).

Key

1. Option to use a separate agreement for Brokers with different permissions.
2. If your Broker Confidentiality Agreement requires brokers to input their client information, consider disallowing online execution. Instead, require Brokers to print, fill in required fields and send back.

Quick Tip: You can upload and enable a broker agreement at anytime during the marketing process.
Confidentiality Agreement (Investor View)

The Confidentiality Agreement will appear to investors with their name and contact information pre-populated to the left. Investors can add/edit their contact information, add notes (if allowed), and agree to the Agreement online.

**Key**

1. **Investor’s name and contact information are pre-populated with the information on file in the RCM database or in your uploaded list.**

2. **Investors are able to add their email address. NOTE: This is not a required field for investors to Execute the Agreement.**

3. **Investors must agree to the Electronic Records & Signature, Terms & Conditions and Privacy Policy prior to executing the agreement.**

---

**Quick Tip:** If your uploaded list contains incomplete information, investors will be required to complete before executing.
Email

The Email tab is used to create emails that direct Users to the Executive Summary, Confidentiality Agreement, Virtual Deal Room and Offers Room.

You will need the following emails during the marketing & sales process:

- Initial Broadcast
- Second Broadcast (send to everyone who didn’t respond to the Initial Broadcast)
- VDR Invite (Access into Virtual Deal Room)
- Call For Offers (Access to the online Offers page)
- VDR Doc Alert (Sent when new documents are available in the VDR)

Key

1. Copy an email within a Project to create a new email by clicking the document icon.
2. Click on the pencil icon to edit.
3. Click on Remove Template icon to remove an email.
4. Copy an email from a previous Project.

Quick Tip: It is recommended to send your Non-Responder email 5-7 days after your Initial Broadcast. Make sure the subject line and email content are different than the Initial Broadcast for maximum response.
Email (cont’d)

Quick Tip: Approve Users should be set to NO for all emails except those granting access to the VDR.

Test the email prior to scheduling to ensure all links are working properly.

From Alias should be the name of the sender.

Reply To should be the email address(es) that should receive replies. Separate email addresses with “;” and a space.

Subject Line should be brief, compelling, and free of spam words and excess punctuation (ex: Free, !!!).

Test blasts should never be sent to anyone outside your deal team. Use Generic Links/Emails instead. Test emails contain test links and DO NOT provide any tracking, reporting, or security.
Quick Tip: You will want to take note of the image pixel width upon replacing the image. If the width changes, you will want to reset it back so it will fit the template appropriately.

Key

9 Remove the current text and type in the content or copy/paste from an existing document. Be sure to use the clipboard to remove hidden formatting (right-click on the mouse and select “Paste”).

10 Right-click on the image to replace, or click on the image icon in the toolbar.

11 When replacing an image, note the width and adjust your new image accordingly.
Quick Tip: Test blasts should NEVER be sent to anyone outside your deal room. Use generic links/emails instead.

Email (cont’d)

12 Click on the test button to send a test email.

13 Your email address will be pre-populated. You can add additional email addresses by typing in the email address or selecting contacts from the drop down.

14 To send emails outside your deal team use generic links rather than test links.
Virtual Deal Room Tab
**Virtual Deal Room (Administrative View)**

The Virtual Deal Room (VDR) is a place where investors will view due diligence for the Project after executing the Confidentiality Agreement.

Create folders within the VDR and upload individual files or upload entire directories at once. Right-click files/folders to edit; double-click to rename. Reorder/move files using drag-and-drop. Most file types are supported. Set security levels on folders or files.

Dropdown Menu Options:

- **Search**: Search VDR for files.
- **Send Document Alert**: Send alerts for newly added documents.
- **Add VDR Space**: Click to purchase additional space.
- **View Table of Contents**: Generate an Excel file of all files and folders that have been uploaded.
- **Edit VDR Template**: Allows you to edit the look of the Investor's View.
- **Create Web Link**: Create a trackable link to an outside web page.

Quick Tip: You can use drag and drop to move files/folders to other folders or change the display order in the current folders.
Virtual Deal Room (Administrative View cont’d)

Key

6. Use Upload Files to select multiple folders and files at one time, or drag-and-drop.

NOTE: If the Upload Multiple File box does not appear, you may need to update your Java at www.java.com.

7. Right click on any file or folder to edit name, description, and security levels. Low security files will be available to Investors whose security level is set to Low.

Security Levels:
- For Medium, set to Medium
- For High, set to High
- For Seller Team, set to Seller Team

8. Change the file name or add a description.

NOTE:
OM and Argus are typically set to Low security and are available to Investors immediately upon executing your Confidentiality Agreement.

Quick Tip: You will want to limit your uploads to approximately 300-400 MB at a time, depending on your internet connection.
Virtual Deal Room (Administrative View cont’d)

Key

9 Notify Investors of newly added documents or folders using Document Alert. Select the Email Template, choose the file(s) or folder(s) you wish to alert them of, and click Confirm & Send. Only those Users with security permissions to those files/folders will receive the Alert Email.

10 Download an excel file of all files/folders that includes security level and last updated date.

11 Additional VDR space can be purchased with a credit card by clicking on the Add VDR Space link.

Quick Tip: After deleting files, you will need to remove files from Deleted Files to adjust your free space.
Virtual Deal Room (Investor or Client View)

Investors see only the files/folders they have permission to access. They can click to view single files or download all files and folders at once. All view and download activity is tracked and available in the Agreement Report.

Key

1. Search for files and folders by name and type.
2. Use the Advanced Search icon for additional search options, such as date added or new files since last visit to VDR.
3. Investors can select multiple folders and files at once for download.
4. Submit an Offer on this Project. If the Offer Page is set up and enabled, a button will appear allowing Investors to go directly to the page to submit an offer.
5. Submit questions to the Broker team or request technical support.

Quick Tip: As an Administrator, you will see all files/folders in the Client View, regardless of Security setting. Files/folders viewed or downloaded from the Client View will not be shown in Reports.
RCM Virtual Deal Room - with Even More Options

Designed by commercial real estate professionals for commercial real estate professionals, the RCM Virtual Deal Room is the most intuitive, secure, and cost-effective solution for accessing and sharing underwriting and due diligence materials. In addition to utilizing the basic features of the Virtual Deal Room, further security services are available such as Group Security, PDF Digital Rights Management Encryption, and Watermarking for Printed PDF Documents. Click here to learn more about RCM’s Virtual Deal Room added services.
Broadcast Tab
Broadcast (Overview)

The Broadcast tab is the command center for communicating with Buyers. Within this tab, you will be able to perform the following:

- Schedule your own broadcasts
- Add/Import your Buyer list of up to 8,000 users
- Add individual users
- Send emails to individual users
- Send emails to multiple users if their progress is Pending Approval to VDR or Approved (VDR - Low, VDR - Medium, VDR - High, or VDR - Seller Team)
- Request Initial Broadcast

Additional Features include:

- View and manage a user’s progress
- Manage security permissions
- View and add notes on user
- View history of all actions affecting that user
- Expire users from accessing the Project or receiving further information
- Access a user’s unique link
- Designate groups of users as flagged and only send to those users
Quick Tip: If your uploaded file is missing Name, Company or Phone Number, this information will not be available to you in the Broadcast or Reports tabs.

Broadcast (Adding/Importing Users)

To import multiple users, click Import on the User’s drop-down.

Click the Import Template button for a template Excel file that includes additional columns that can be imported.

Click the upload icon and select your Excel or .csv file. The file must include the four required column headings, named exactly as shown.

Select the appropriate worksheet on your Excel file, the industry role of the users (Principal,Broker,etc.) and make sure progress is set to None. Choosing a progress level other than None (ex: VDR Docs - Medium) will import Users with that progress.

Review the Import Confirmation box to see the number of users in your file, the number who may already exist in the Broadcast tab, the number of duplicates in your file, the number of users unable to be imported and the number of users that will be added.
Broadcast (Adding/Importing Users cont’d)

Quick Tip: The system will look for users already in your Broadcast tab and will not import duplicate email addresses.

Key

6. The Import Confirmation box displays the number of users who have been imported, already listed, duplicates and users unable to import.

7. Click Import. An Import Complete box will appear confirming the import.

8. After reviewing the information in the Import Confirmation box, click Export to Excel for a list of users that you should edit in your database.
Broadcast (Adding Individual Users)

Quick Tip: You can export a filtered list. For example, to export a list of all users approved to your Virtual Deal Room, click the Advanced Search icon, select all VDR progresses (Low, Medium, etc.) and Search. You can then click Export Users to download to Excel.

Key

1. To add individual users, click Add on the User’s drop-down. Name, Email and Industry Role are required.

2. To add multiple users at once, choose Import.

3. Click Export on the Users drop-down to export the Broadcast list into Excel.
Broadcast (Request Initial Broadcast)

1. Under Broadcast select Request Broadcast.
2. Select the email template, time* and date you would like to schedule the initial broadcast.
3. Review the broadcast information and if accurate, click Request.

**NOTE:** Once you select Request, the approval will be sent to your RCM account manager. Your account manager will schedule the broadcast based on the date/time* requested.

* Timezone is Pacific.

4. Review sent & scheduled broadcast as well as delete a broadcast that has been scheduled for a future date/time.
Under Broadcast select Schedule Broadcast. 
Select the email template. 
Select the industry role. 
Select any filter (users). 
Select the time and date you would like to schedule the blast. (Timezone is PT) 
Click Schedule. 

NOTE: Please review the test broadcast to make sure all links, email addresses, spelling and grammar are correct. 

Click Ok. Broadcast has been scheduled.
Broadcast (Schedule to Approved Users)

1. Under Broadcast select Schedule Broadcast.
2. Click “New” and select Broadcast to Approved (VDR Access).
3. Select the Email template, time and date you would like to schedule the blast.
4. Click “Schedule”.
5. **NOTE:** You can still test the emails from this window by using the “Test Broadcast” option, but are not required to approved the broadcast.
Broadcast (Cancel or Edit a Scheduled Broadcast)

For those who have been given permission to schedule broadcasts, you also have the ability to edit or cancel the scheduled broadcast.

Key

1. Under Broadcast select Schedule Broadcast.
2. Select the broadcast you wish to cancel and click trash can icon to remove.

NOTE: You can only cancel broadcasts that have a status of Scheduled.

3. Under Broadcast select Schedule Broadcast.
4. Select the broadcast you wish to edit.
5. Click pencil icon to Edit. Make your changes.
6. Re-select the date and time.
7. Click Save.
Broadcast (Sending Emails to Individual Users)

You can send emails to individual users one at a time as needed.

Key

1. Find the user in the list and check the box next to the user’s name. A Send Email button will appear below.
2. Click the Send Email button for a list of available emails.
3. Select the Email you wish to send and click Send.
**Broadcast** (Sending Emails to Multiple Pending and Approved Users)

After your initial and second broadcast has been sent, you can send emails to individual users one at a time.

**Key**

1. Click Advanced Filter.
2. Select either the Pending Approval to VDR progress or any of the VDR progresses. Click Search.
3. Users matching the progresses will appear in the list.

**Quick Tip:** You cannot send to multiple users if their progress is something other than Pending or Approved (VDR - Low, Medium, High, Seller Team).
Broadcast (Sending Emails to Multiple Pending and Approved Users cont’d)

4. Click the checkbox next to Name to select All Users. Send Email button will appear below.

5. Click the Send Email button for a list of Available Emails.

6. Select the Email you wish to send and click Send.
Broadcast (Additional Features)

User Broadcast Tools:
- Individually select a User to edit, send email to or remove from the list (prior to Broadcast).
- Edit a User’s profile by clicking on their name shown at the bottom of the screen. If the RCM database is purchased, you will not be able to edit that User’s contact information.
- Set expirations.
- Set security levels.
- Access a User’s unique link.
- View/add User notes.
- Remove User.
- View history of User actions.

Key
1. A user’s progress is displayed in the Progress column. For a list of all progresses, see Appendix A.
2. Click Advanced Filter to search by Progress.
3. User progresses are updated automatically based on a user’s actions. For example, once a user views your email but takes no further action, their progress is Viewed Email. If that user later views your Executive Summary but takes no further action, their progress will be updated to Executive Summary.

Quick Tip: You can search for all approved users and select them and send to all of them at once.
Broadcast (Additional Features cont’d)

4 You can change a user’s progress by expiring their access, setting their Security Level. Low, Medium, High and Seller Team refer to security levels in the Virtual Deal Room.

5 For users who return their agreement offline, click Viewed Agreement in the Security Level drop-down and import a PDF of their file. The user’s progress will be updated based on whether you send them an email to the VDR or not.

6 Revoke a user’s VDR permission by selecting Unapproved. Their progress will change to Pending Approval to VDR and they will no longer have access to the VDR.
Quick Tip: You can click a client owned user’s name to open their User profile and view/edit their contact information.

You can click the History button to view all actions to or taken by that user.

Click Notes to add notes for a user. If the user entered notes when executing the Confidentiality Agreement, their note will also appear here.

Broadcast (Additional Features cont’d)

Quick Tip: Users can only be removed from the Broadcast tab prior to being broadcasted.
Broadcast (Additional Features cont’d)

Quick Tip: You can send a user their unique link in a personal email and maintain tracking capability and report information.

Key

10 When sending emails using the RCM platform, recipients receive Unique Links to access your Executive Summary, Confidentiality Agreement, Virtual Deal Room and Offer Page without having to register. Clicks are tracked in Reports. When sending a personalized email to a single user outside of the RCM platform (ex: via Outlook), copy and paste their Unique Link into your email.

11 When sending an email to multiple users outside of the RCM Platform, copy and paste a single Generic Link. Users will be able to click the link and view the Executive Summary, but will be prompted to register when clicking the agreement. Registrations will be tracked in Reports.

NOTE: Clicking on a user’s Unique Link will appear in the reporting as though that user took the action, and will result in inaccurate reporting.
Broadcast (Additional Features cont’d)

To broadcast to several users who span multiple progresses or a subset of a progress group, you will want to Flag them then request to Broadcast to Flagged users.

Quick Tip: When flagging over 100 users, you must Flag users on each page before proceeding.

Key

12. Check the box next to the Users you want to flag.
13. Click Users and select Flag.
14. If users in your Broadcast list are already flagged, you will be prompted to either add to that list or clear previously flagged users.
Progress Terms for the Broadcast Tab

**All Responders**: A user who has opened an email, clicked any link in an email, or entered the listing via a generic link or RCM Marketplace.

**Approved**: A progress designation on the Broadcast tab. A user who has executed the agreement and been given access to the VDR.

**Declined**: A progress designation on the Broadcast tab. An action taken by a user to alert the deal team that they are not interested in a listing. This action will expire their links and remove them from any future broadcasts taking place on a particular listing.

**Expired**: A progress designation on the Broadcast tab. Users who have been set to “expire” and will not receive any future broadcasts and their links will be inactive.

**Non-Responders**: A progress designation on the Broadcast tab. A User who has been Broadcasted to but has performed no action. (Ex: Did not open your email or click on the link to view your Executive Summary). Users whose progress you have manually set but who have not taken any action themselves are still classified as Non-Responders.

**Not Broadcasted**: A progress designation on the Broadcast tab. A User who has not been sent an email or been manually given another progress level.

**Pending Approval**: A progress designation on the Broadcast tab. A user who has executed the Confidentiality Agreement and are waiting to be approved into the VDR.

**Submitted Offer**: A user who has submitted an offer through the Offers page.
Progress Terms for the Broadcast Tab (cont’d)

**Unsubscribe**: A user who has elected to not receive any additional email correspondence from your team. You will be able to import this user, but their progress will be Unsubscribed and will not be included in the email broadcasts.

**Viewed Agreement**: A progress designation on the Broadcast tab. A user who has viewed an agreement but did not execute.

**Viewed Email**: A progress designation on the Broadcast tab. A user who has viewed an email.

**Viewed Executive Summary**: A progress designation on the Broadcast tab. A user who has view the Executive Summary.

**VDR Security:**

- **Low**: All users will be defaulted to a low security once they execute the Confidentiality Agreement. Users who are set to low security will only be able to view documents in the VDR that are set at a low.

- **Medium**: Users set at Medium will be able to view documents set at low and medium.

- **High**: Users set at High will be able to view documents set at low, medium and high.

- **Seller Team**: Users set at Seller Team will be able to view documents set at low, medium, high and seller team.
Seasoned brokers know that a well-maintained database of active investors increases buyer participation, results in more offers, and ensures maximum pricing. The accuracy of your contact list is the most critical component to the success of your business. However, with roughly a quarter of your database becoming obsolete each year, keeping your list (and your business) healthy and active presents a challenge.

Target the Most Relevant Pool of Qualified Commercial Investors

Clean and accurate investor data is at the heart of what sets RCM apart. Quickly target the most relevant pool of serious investors based on dozens of different acquisition parameters. Say goodbye to non-responsive investors and hello to the industry’s most active community of qualified real estate buyers—the RCM Qualified Principal Database.

Developed over 18 years, RCM's Qualified Principal Database is maintained daily by our in-house research team. Our dedicated researchers use a strict screening process that ensures accuracy and guarantees that only qualified investors are included.

Click here to view more details on how you can attract more qualified principals, receive more offers, and maximize sales potential in less time.
Offers Tab
The Offers tab allows you to solicit and manage indicative or final bids electronically by providing access to review bidding instructions, upload an offer/LOI, and submit an offer summary. Submitted offer information automatically creates a bid matrix available in Reports.

**Key**

1. Enter the date your indicative or final offers are due.
2. Customize the instructions text to your offers process.
3. Add, edit, or remove fields for buyers to complete or review and set which fields are required.
4. Click Preview to view the offer page as Investors will view it.
5. Check box to activate the Offers Page. Once Activated an Offers button will appear on the VDR, Landing Pages, and can add a link to an email.
6. Create multiple rounds of online offers with separate offer requirements. Separate reporting for each round will be included in the Reporting/Offer tab.
Offers (Administrative View cont’d)

Key:

7. Click Add to add new documents for users to execute, upload or review.

8. Determine which files, if any, are required to submit an offer.

9. Allow investors the option to include comments with their offer submission.

10. Include helpful links to websites or additional PDF documents that require no action.
Access to the Offers Page is only available to users who have executed the Confidentiality Agreement and have been granted access to the Virtual Deal Room. Therefore, the Executive Summary and Confidentiality Agreement buttons are displayed so the buyer can execute the agreement in order to submit an offer.
Reports Tab
Reports

RCM offers you several Reports to be used throughout the marketing, due diligence and sales process.

**Dashboard:** View a summary of your marketing efforts along with an interactive map that indicates where interest is coming from.

**Activity Report:** All-inclusive report showing each time a user takes action such as Viewed Executive Summary, Viewed Agreement, Executed Agreement, Entered Virtual Deal Room, etc. Also indicates how a user accessed each page (ex: entered the VDR from an email link, view your Executive Summary from the project or RCM Marketplace).

**Agreement Report:** Most popular report detailing who has viewed/executed the agreement, which documents they have downloaded, and the user’s contact information.

**Offers Report:** Offer matrix of all bids that have been received or submitted.

**Users Broadcast:** Lists everyone who has been sent an email, which email they were sent, and by whom.

**Bounces:** All returned email addresses that have occurred from all broadcasts.

---

**Key**

1. The Dashboard chart provides a summary of response to your Project. Click each chevron to update the map with the selected progress level.

2. The Global Map of capital shows the location of investors who have activity on your Project.
Quick Tip: You can click on the Action hyperlink to see all actions taken by this user.
Quick Tip: You can export the above report and use as a broker's call list to follow up with investors who have expressed interest.

Reports (Agreements)

Key

1. Search by company, user first or last name, or full email address.
2. Columns are sortable and customizable.
3. Export the report to PDF or excel.
4. Download all Confidentiality Agreements at once or select date range.

NOTE: If user information, such as phone number or company, is not included in your User Import file, it may not appear in your Reports.
### Reports (Agreements - cont’d)

You can choose to export this report to view all files that a user has downloaded. This information will be on the second worksheet of the excel file.

**Quick Tip:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Company</th>
<th>Role</th>
<th>City</th>
<th>State</th>
<th>Phone</th>
<th>Agreement</th>
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</table>

**Key**

- **6** View/print Investor’s executed Confidentiality Agreement.
- **7** Click the Upload link to upload an Agreement that was executed offline.
- **8** Scroll right to see additional fields:
  - **Files:** All files that have been downloaded. Click the number to see which files have been viewed/downloaded and when.
  - **Notes:** View/add notes on individual Users.
Reports (Agreements - cont’d)

9. Click on Options to create Custom Columns for your report.

10. Examples of Custom Columns:
   - Tour Dates
   - Submitted Offer (Y/N)
   - Called/Spoken to
   - Ranking
Reports (Offers)

The Offers Report displays all bids that have been entered online along with any uploaded documents.

Key

1. Click on document numbers to view documents uploaded or executed by the Investor.
2. Hover over document number to preview upload details.
3. Columns are sortable.
4. Export report to Excel or print a PDF of all documents uploaded by bidders.
5. Scatterplot Chart of the first two offer fields (ex: Price, Deposit, Due Diligence Completed, Closing Date)
6. Multiple Rounds
Reports (User Broadcast)

Key
1. Click on User Broadcast to open an Excel file of all Broadcast activity.
2. See which email template they were sent, when, and by whom.
Quick Tip: If you choose “All” under email template, the report will contain separate worksheets of each email Broadcast.

Reports (Bounces)

1. Click on Bounces to open the Bounce Report dialogue box.
2. Select the Email Template, start and end date you wish to run the report for.
3. Once you click “Click here to download the report” you will be able to view the Bounce Report.

Key
Glossary of Terms
**Glossary of Terms**

**Activity Report:** All-inclusive report showing each time an investor takes action such as Viewed Executive Summary, Viewed Agreement, Executed Agreement, Entered Virtual Deal Room, etc., and the sources used to access that link.

**Agreement Report:** Most popular report detailing who has viewed/executed the agreement, which documents they have downloaded, and the user’s contact information.

**All Responders:** A user who has opened an email, clicked any link in an email, or entered the Project via a generic link or RCM Marketplace.

**Bounce:** An email that is not delivered due an invalid email address or spam designation.

**Brochure:** A short PDF document that is used as your Executive Summary. This will consist of the main points of the Project and is available to all users on your broadcast list.

**Document Alert:** An email sent to all Approved users (those who have executed the agreement) advising them of updates made to the Virtual Deal Room.

**Domain Registration:** A unique URL (ex: www.123MainSt.com) designated for the Project that will direct a user to your Executive Summary. Users will be prompted to register to access the Confidentiality Agreement.

**Email Template:** Emails you can customize and send to your list of Investors.

**Executive Summary:** An overview of the main points of the Project, also known as the Landing Page, Teaser and/or Brochure.

**Import Limit:** The 8,000 limit is a restriction on the number of records that a client can import for a single project (8,000 unique email addresses).

**Landing Page:** A web based presentation that is used as your Executive Summary which is an overview of the main points of the Project.
Glossary of Terms (cont’d)

**Link**: A URL that allows the user to access the Executive Summary, Confidentiality Agreement, Offers Page, Virtual Deal Room.

**Project**: Any piece of commercial real estate, loan on commercial property, debt interest securing commercial real property, equity interest in entities that own commercial real estate or any other commercial real estate related asset that has been engaged by a seller or owner to market, sell, lease, manage, capitalize, or re-capitalize such assets.

**MSA**: A Metro Statistical Area. A geographical region with a relatively high population density at its core and close economic ties throughout the area. MSA is a required field for all Projects.

**Offers Report**: Offer matrix of all bids that have been received or submitted.

**Responders**: A progress designation on the Broadcast tab. A Responder is a User who has viewed the email, the executive summary, the confidentiality agreement, or has executed the confidentiality agreement.

**Restricted Criteria**: In order to remain spam compliant, when a User provides RCM with specific criteria for property types and location, RCM restricts them from being added to any project outside of that criteria (whether attempted to be added by RCM or a client import).

**Send again**: To resend the Project to all Users (Responders and Non-Responders) on the Broadcast tab again.
Glossary of Terms (cont’d)

**Suppressed User:** A User’s email that RCM no longer permits to be sent to. In most cases the email is invalid but a globally suppressed email can also be a valid working email.

A suppressed email occurs because one (or more) of the following has occurred:

1. RCM has verified the email is invalid.
2. RCM has received multiple bounces (returned emails) saying the email is no longer valid.
3. RCM has verified the user is no longer with the company (email may or may not still be working).
4. The user has requested to not receive investment opportunities.
5. The user has reported RCM emails as spam.
6. The user has multiple emails addresses and has emails to be sent to only one of the email accounts.

**Unique Links:** A link that is unique to a particular user that provides tracking, reporting and security to that individual user.

**User Broadcast:** A report of all Broadcasts broken down by what email was sent, by who and when to a particular user.

**VDR Security:**

- **Low:** Users who are set to low security will only be able to view documents in the VDR that are set at a low.

- **Medium:** A security level assigned to files and folders in the Virtual Deal Room. Users set at Medium will be able to view documents set at low and medium.

- **High:** Users set at High will be able to view documents set at low, medium and high.

- **Seller Team:** Users set at Seller Team will be able to view documents set at low, medium, high and seller team.

**Virtual Deal Room (VDR):** A secure place to post your Offering Memorandum and Due Diligence materials.
Progress Terms for the Broadcast Tab

**All Responders**: A user who has opened an email, clicked any link in an email, or entered the Project via a generic link or RCM Marketplace.

**Approved**: A progress designation on the Broadcast tab. A user who has executed the agreement and been given access to the VDR.

**Declined**: A progress designation on the Broadcast tab. An action taken by a user to alert the deal team that they are not interested in a listing. This action will expire their links and remove them from any future broadcasts taking place on a particular listing.

**Expired**: A progress designation on the Broadcast tab. Users who have been set to “expire” and will not receive any future broadcasts and their links will be inactive.

**Non-Responders**: A progress designation on the Broadcast tab. A User who has been Broadcasted to but has performed no action. (Ex: Did not open your email or click on the link to view your Executive Summary). Users whose progress you have manually set but who have not taken any action themselves are still classified as Non-Responders.

**Not Broadcasted**: A progress designation on the Broadcast tab. A User who has not been sent an email or been manually given another progress level.

**Pending Approval**: A progress designation on the Broadcast tab. A user who has executed the Confidentiality Agreement and are waiting to be approved into the VDR.

**Submitted Offer**: A user who has submitted an offer through the Offers page.
**Progress Terms for the Broadcast Tab (cont’d)**

**Unsubscribe:** A user who has elected to not receive any additional email correspondence from your team. You will be able to import this user, but their progress will be Unsubscribed and will not be included in the email broadcasts.

**Viewed Agreement:** A progress designation on the Broadcast tab. A user who has viewed an agreement but did not execute.

**Viewed Email:** A progress designation on the Broadcast tab. A user who has viewed an email.

**Viewed Executive Summary:** A progress designation on the Broadcast tab. A user who has view the Executive Summary.

**VDR Security:**

- **Low:** All users will be defaulted to a low security once they execute the Confidentiality Agreement. Users who are set to low security will only be able to view documents in the VDR that are set at a low.

- **Medium:** Users set at Medium will be able to view documents set at low and medium.

- **High:** Users set at High will be able to view documents set at low, medium and high.

- **Seller Team:** Users set at Seller Team will be able to view documents set at low, medium, high and seller team.
RCM User Import Help

Users can be imported using Excel or CSV files. While many CRM systems will export files that can be imported directly into RCM, you may need to edit the column names of your file.

> The first row must contain the following column names:
  First, Last, Email, Company

> First and last names must be in separate columns
  If your file displays First and Last names in the same column, they will need to be separated prior to import (follow steps below)

> The following column names are optional & will be imported if provided:
  Title, Address, City, State, Zip, Country, Phone, Ext

⚠️ If the information is not provided, it will not be available in reports. We strongly recommend including phone numbers so it is available in your reports.

> File name must be less than 50 characters
> Worksheet name must be less than 35 characters

How to Separate Columns

**Step One**

Copy the column (Name) to the end of the worksheet where there are open columns

**Step Two**

Highlight the Name Column and go to Data-> Text To Columns and the next window will pop up
By default, the Tab Delimiter is selected. Click Next.

Check the box marked “Space”. And click Next...

Finally, the wizard asks if you want to format the data. The default, General formatting is just fine. Press “Finish”.

Be sure to rename the column headings: First, Last.
Email Marketing Best Practices

Email is an extremely powerful and effective marketing technique when used correctly. These best practices will allow you to create better emails that maximize deliverability to and response from your intended recipients.

> Use Short Subject Lines
Subject Lines determine whether your email is deleted, read or saved for later. Your subject line is competing with lots of other emails, tweets, and posts so limit to 20 to 50 characters whenever possible.

> Keep It Brief
Good email marketing is succinct and offers valuable content. Don’t wait until the fifth paragraph to provide the link or call to action — you could lose your audience. Remember that smartphone users may only see a few lines when reading email on their mobile device.

> Include Text At The Top
Images have a place in email, but don’t force your recipient to click on “view image” or scroll down to reach actionable information. The initial copy should be informative and interesting.

> Do Not Use CAPITAL LETTERS Unnecessarily
Not only is this considered unprofessional and difficult to read, but SPAM filters may send your message to the Junk Folder.

> Check For Misspellings
Spammers often misspell words to get past filters.
Email Marketing Best Practices (cont’d)

> **Limit or Avoid Common Spam Words**
  Free  Cash  Bonus  Amazing
  %Off  Buy  Direct  Discounted

> **Don’t Use Excessive Punctuation**
  You may be excited about a new deal, but avoid !!! ??? and $$$. 

> **Make Links and Buttons Obvious**
  Don’t make people search your email for links to the executive summary or confidentiality agreement.

> **Schedule Your Email to Be Sent When Recipients Are Available**
  Send your emails during regular business hours and avoid sending on weekends or late in the evening.

> **Use “Clean” Email Templates**
  It is important to make sure that your email doesn’t contain extraneous or hidden HTML code.

> **Reformat Content**
  If your email has been previously marketed using a different email campaign provider, change the subject line, update or reformat the text in the email, and change the image prior to resending.
### Added Services

**RCM (Principal) Database**

**RCM Qualified Principal List** - In addition to sending your list of contacts, you can elect to leverage the RCM Principal Database, which contains the acquisition criteria of over 45,000 qualified real estate buyers of commercial property and notes. Send your investment opportunity to buyers whose acquisition criteria align with your asset (based on asset details such as asset type, location, and value). Name and company information for each investor provided upon engagement; full contact information provided when an investor executes a confidentiality agreement.

*Price:* $1,500/Listing

**RCM (Broker) Database**

**RCM Qualified Broker List** - In addition to sending your list of contacts, you can elect to leverage the RCM Broker Database, which contains the acquisition criteria of over 65,000 brokers of commercial property and notes. Send your investment opportunity to brokers whose acquisition criteria align with your asset (based on asset details such as asset type, location, and value). Name and company information for each broker provided upon engagement; full contact information provided when a broker executes a confidentiality agreement.

*Price:* $1,000/Listing

**Custom Teaser Design**

**Custom Design** - Standard functionality allows you to create a full-featured, custom branded, mobile-friendly executive summary presentation with a photo gallery, auto-mapping, and unlimited information tabs. Alternatively, RCM designers can build a custom executive summary presentation to match existing property branded material.

*Price:* $150/ Hour

**Domain Name Change**

**Domain Name Change** - Custom domain name (ex: 123mainstreet.com) is included with each listing. A fee will be applied to change the domain after the initial registration.

*Price:* $100/Domain Name
**Added Services (cont’d)**

**Group Security**

*Group Security* - Standard security allows you to set 4 security levels for investors (Low, medium, high, and seller team. Investor access set to medium security will see files set at medium and low security). Group security allows you to disseminate confidential documents in layers according to participant groups, roles and permission authorization (e.g. give a single user access to a single document).

$1,000/Listing

**PDF Digital Rights Management Encryption**

*Digital Rights Management (DRM)* - Document encryption technology that restricts users from downloading, viewing or printing PDF files, even after they have been downloaded. Includes Group Security functionality.

$2,000/Listing

**Watermark Technology for Printed PDF Documents**

*Watermarking* - Detailed reports show you who has viewed or downloaded your Offering Memorandum and no other due diligence materials. Option to include an automatic watermark on PDF documents to discourage unauthorized sharing. Watermark contains user’s name, company, IP address, and access date and time stamp.

$250/Listing

**Link Restriction**

*Link Restriction* - Default settings allow users to click links from multiple devices. Link Restriction limits access by associating a user’s unique link for a specific listing’s Confidentiality Agreement, Virtual Deal Room, and Offers pages to the computer and browser they used to first access that link.

$500/Listing

**Additional Virtual Deal Room Space**

*Virtual Deal Room (VDR) Space* - Your listing comes with 1GB of document space. Additional space can be added per the following schedule.

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<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>100 MB</td>
<td>$250</td>
</tr>
<tr>
<td>1 GB</td>
<td>$1,000</td>
</tr>
</tbody>
</table>